OSU
Oregon State
UNIVERSITY

REQUEST FOR INFORMATION
No. WY164413

Business Intelligence Solution

I. SCHEDULE OF EVENTS

SCHEDULE OF EVENTS:

Issue Date..April 22, 2013

Due Date and Time...May 17, 2013 (3:00 pm, PT)

CONFERENCE:

A conference is not required.

II. ISSUING OFFICE AND CONTACT

ISSUING OFFICE:

The Procurement and Contract Services (PaCS) department of Oregon State University (OSU), is the issuing office and is the sole point of contact for this Request for Information. All concerns or questions pertaining to this Request for Information should be appropriately addressed to the individual identified below:

CONTACT PERSON:

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III. INTRODUCTION

INTRODUCTION:

This is a Request for Information (RFI), issued by Oregon State University (OSU) Procurement and Contract Services (PaCS). The purpose of this RFI is to solicit input from potential contractors for information pertaining to a Business Intelligence solution.

Purpose
Oregon State University is seeking to create a next-generation Business Intelligence solution. The solution will leverage "best of breed" systems for deployment of enterprise reporting, dashboards, security management at the report level, mobile functionality, and robust self-service non-technical query and ad-hoc reporting tools. The solution will provide for the data analysis and operational reporting needs of academic and administrative users.

OSU's CORE project is to develop a Business Intelligence Competency Center including both University-wide enterprise reporting and self-service end-user-developed operational reports and queries. The University is searching for a Business Intelligence solution that will replace the existing Hummingbird BI Query self–service ad-hoc query and reporting tool.

Goals/Scope
Specific goals include:
- Provide a standard ODBC/JDBC and SQL interfaces for visualization/reporting tools.
- Contain needed functional and technical metadata descriptions.
- Provide a common location for business rules to be implemented.
- Provide ability to connect disparate data sources outside of the Banner ERP and Oracle Data Warehouse.
- Provide data driven security functionality to control access to sensitive information.
- Provide an ad hoc tool for users to develop their own queries of data, save and share to a common library accessible to other users.
- Provide a robust scheduling and distribution process for information/reports.
- Provide analytical and predictive analytical tools.
- Provide dashboard capabilities for service delivery.
- Provide mobile access to business intelligence functionality.

User Base
The project will encompass users throughout the University. Clients and customers of the product range from Deans, Department Heads and Executive Level Management who may want dashboard reports with drill down capability to end users running operational day-to-day detail reports. There will be users who run centrally developed reports; those who run reports and develop their own ad–hoc queries regularly; those who develop detailed reports for their departments and groups; and a central administration and report development group. The software solution must be able to address each set of users.

OREGON STATE UNIVERSITY:
Founded in 1868, Oregon State University is a comprehensive, research-extensive, public university located in Corvallis. OSU is a member of the Oregon University System and one of only two American universities to hold the Land Grant, Sea Grant, Space Grant and Sun Grant designations. OSU is also the only Oregon institution to hold the Carnegie Foundation's top ranking for research universities, a recognition of the depth and quality of OSU's graduate education and research programs.

Through its centers, institutes, Extension offices and Experiment Stations, OSU has a presence in almost every one of Oregon's 36 counties, including its main campus in Corvallis, the Hatfield Marine Sciences Center in Newport and OSU-Cascades Campus in Bend. OSU offers undergraduate, master's and doctoral degrees through 12 academic colleges enrolling more than 25,000 students from every county in Oregon, every state in the country and more than 90 nations.

IV. REQUIREMENTS

Please describe how your solution addresses the following areas:
- Auditing

- Provide audit trails of system execution; capture reports accessed/viewed, parameters chosen, IP address, user credentials, etc.
  - Create reports from audit trail data
- Debugging
  - Provide elements to support system debugging
- Error Management
  - Provide the capability to detect, propagate, and report on errors
- Information Exchange
  - Connect to multiple systems and data sources, including:
    - Text files, spreadsheets, and XML files
    - Database, including Oracle and SQL Server, using ODBC or JDBC
    - Cloud-based, such as Salesforce and LinkedIn
- Online help
  - Provide online help capability
- Report Delivery
  - Provide web browser-based access to reports
  - Deliver reports through multiple methods, including email, network directory, and printer
  - Provide multiple result types, including text files, HTML, XML, PDF, database table, and spreadsheet
- Report Library
  - Provide a report library with browsing and search capabilities
  - Allow users to save and share with others the reports that they have created
- Reporting
  - Provide a report development environment
    - Create dashboards and scorecards easily
    - Create sophisticated reports including drill through and drill down
    - Create a variety of graphs, charts and visual aids easily
    - Add custom SQL
  - Provide analysis capabilities including calculations on result sets, pivoting, drilldown and drill-through, sorting, and conditional logic (to identify pertinent information easily and visually)
  - Provide parameter-driven capabilities including cascading pick lists
  - Ability to call user credentials within the report environment
  - Provide the capability to do trend and what-if analysis reporting scenarios
  - Ability to alter report sorts and filters easily, without requerying the source data (interactive reporting)
  - Filter data on reports depending on who runs the report
  - Allow users to create their own dashboards by adding charts, graphs, and report links to their dashboard page
  - Create report templates
  - Allow flexible report definitions
    - Provide exact formatting control for both display and print
    - Add graphs and tables on the same page
    - Add headers, footers, logos etc.
    - Allow sub-reports
  - Provide a view of reports and charts optimized for mobile devices
  - Integrate reports in University portals, web pages and applications, at a minimum as a PDF or static output, but preferably as an interactive report
  - Allow users to cancel queries and reports
  - Create predictive models
  - Integrate with Java portlets and Luminus 5

- o Ability to call external API's (Nolij)

- Self-Service Reporting and Analysis
  - o Ability to provide self-service data analysis and reporting tools to non-technical users
  - o Provide the capability to do trend and what-if analysis
  - o Ability for users to share or publish reports and dashboards
  - o Ability to perform ad-hoc analysis in multiple dimensions
  - o Ability to generate use logs and reports
  - o Ability to generate error logs and generate user friendly error messaging

- Scheduling
  - o Provide time- and event-based scheduling
  - o Email reports automatically
- Security
  - o Provide services to protect access to certain resources or information
  - o Provide single sign-on for users
  - o Provide Jasig CAS or Internet2 Shibboleth compliance
  - o Provide security management to create different groups of users
  - o Provide differing capabilities for different users, including:
    - Administrators
    - Report writers / authors
    - Query users
    - Report consumers
  - o Secure individual reports, as well as folder-level security
  - o Ability to facilitate role based security
  - o
- System management
  - o Provide services that facilitate management of the system, including scheduling, monitoring, troubleshooting, software updates, and connectivity
  - o Provide scripting capabilities for automation of all system aspects
  - o Data modeling tools
  - o
- Information Exchange
  - o Ability to work with unstructured or semi-structured data, including Hadoop data sources
- Licensing
  - o Provide services for tracking, acquiring, installing, and monitoring license usage.
- Localization
  - o Provide facilities for supporting multiple human languages.

Please describe your solution's usability and performance:
- Usability
  - o Apply University-specific design elements (branding) to the system interface
  - o Tools and reports should be clear and attractive
- Performance
  - o Average queries or reports execute and display in less than five seconds

Please describe the training required for administrators, report authors and query users.
- Describe the levels of training provided
- Estimate the normal training required for each group
- Can we use a 'train the trainer' approach for end users?

- What training materials are included?

Please describe the installation and operation requirements. OSU installs and maintains software and our own systems. Typically there will be 2 or 3 environments (testing/development and production instances). Please describe the operating system, supported releases, utilities and other requirements needed to operate the system. In addition, please respond to the following:
- Does the system support load balancing?
- Please describe the proposed server hardware requirements
- Please include the operating system requirements
- Please describe the web services and Application Programming Interfaces (APIs) capabilities.

Please describe how your system integrates with other systems or data sources.

Please describe the licensing requirements. We anticipate several levels of users, including administrators, report authors, ad-hoc query users, and report consumers. We prefer a site or processor based license for report consumers. Please include your ongoing maintenance fee.

V. SUBMITTALS

Respondents are requested to submit the following:

- Submit 2 copies of your response;
- Narrative describing the respondent's approach to fulfilling OSU's requirements;
- Marketing material or brochures of goods or services referenced in the narrative;
- Examples of work and materials from similar projects.

Optionally, you may submit your response electronically via email to will.young@oregonstate.edu. If submitting electronically only one copy of your response is needed.

To be considered, responses to this RFI must be received no later than the due date and time indicated in the Schedule of Events. Responses must be sent to the contact person identified in Section II of this RFI.

Information gathered in this process could potentially be incorporated in an Invitation to Bid (ITB) or Request for Proposal (RFP). Any resulting RFP or ITB will be openly competitive and therefore responses should not be exclusive or restrict competition. This RFI does not obligate OSU to issue an RFP or ITB nor to include information submitted by respondents.

A contract will not be issued directly from this RFI, nor will issuance or acceptance of submittals or subsequent conversations bind OSU into any type of contractual obligation or relationship.